# HIOS Portal Overview

February 25, 2013





# Agenda

- ☐ Self Registration
- ☐ Entity Creation
- ☐ User Role Creation & Association





# Self Registration





# Login Page -Click "Register for New Account"

Health Insurance Oversight System
Sign-In
* Indicates required fields.  *User Name:  *Password:
Forgot Password?
Register for New Account  Type the letters you see in the image into the Word  Verification field below. If you are unable to read  the image pictured below, please select the Play  Audio Code link for audio verification
*Word Verification: Please enter the letters you see in the image. If you use the Audio Verification, type the pronounced numbers and the first letter of each word.
Can't read it? Generate New Image
lay Audio Code
Log In  Accessibility Rules of Behavior Web Policies File Formats and Plug-Ins





# New HIOS Users -Self Registration Page

		SIGN-IN
		Welcome
Request HIOS Ac	count	
-		stom (UIOC). If you have any
uestions, please contact the HI	g for access to the Health Insurance Oversight Sy: OS Helpdesk at Phone: 1-877-343-6507 or <b>Email:</b>	insuranceoversight@hhs.gov.
*) Indicates a required field		
Title (Name):	<u> </u>	
*First Name:		
Middle Name:		
Last Name:		
Suffix: *Job Title:	•	
*Organization Name:		
*Email Address:		
Phone Type:	<b>~</b>	
*Phone: (Format: 123-456-7890)		
Phone Ext:		
Address Type:	•	
Address Line 1:		
Address Line 2:		
City:		
State:	▼	
ZIP code:	-	
Reset		Submit





# **User Registration Approval Process**

Once the user fills in the required information and clicks 'Submit', the request will be submitted for approval.

The users will receive an email notification when their user account has been approved.

Once the user has a HIOS user account, they can register organizations and request user roles.



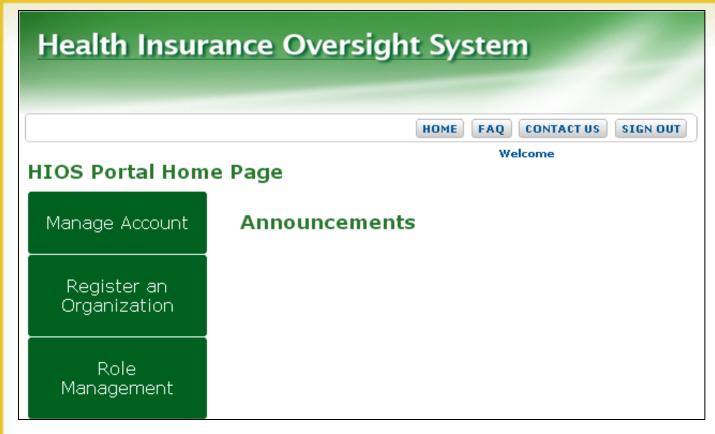


# Register an Organization





# Register an Organization







**Step 1:** Search for company by FEIN.





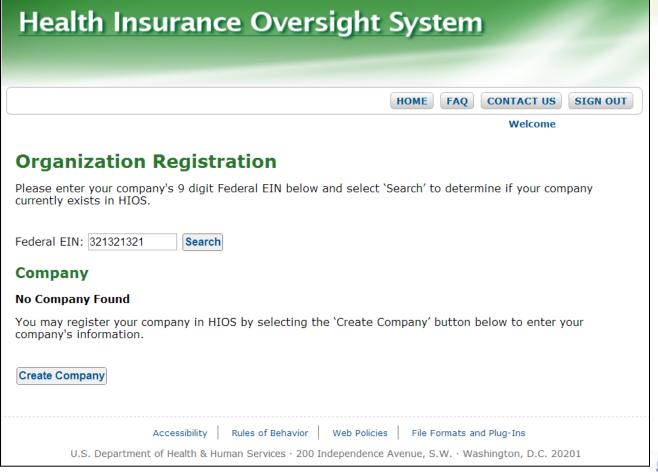
# Search by FEIN







# Company Search Results - None



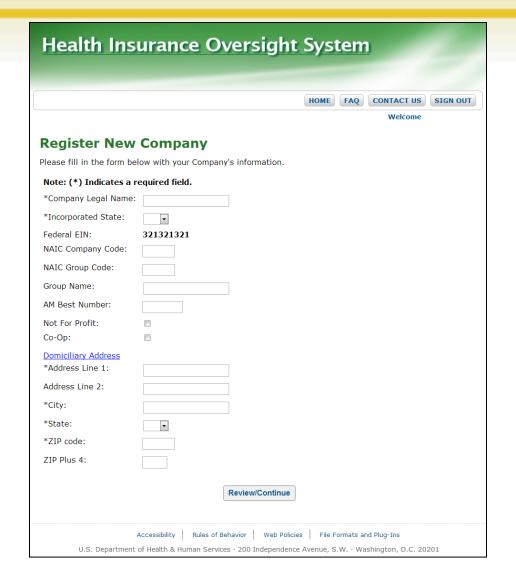


**Step 2:** If no results are returned, the user will click on the 'Create Company' button and be navigated to the 'Register New Company' page.





# Register New HIOS Company





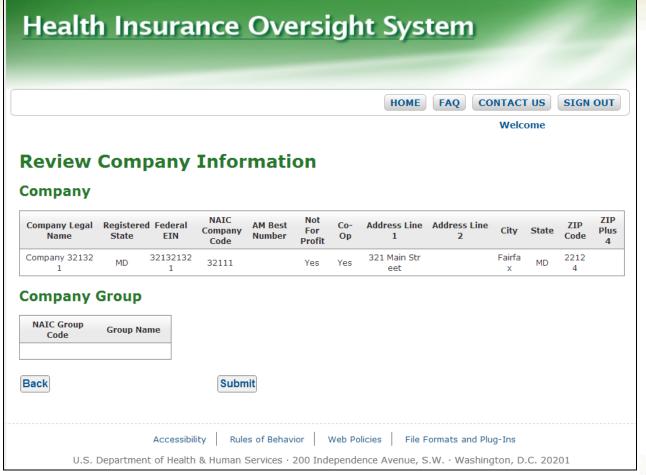


**Step 3:** The user can review the information and submit it for approval.





# **New HIOS Company Creation Review**





**Step 4:** The user will see confirmation that the information was submitted and have the ability to navigate back to the HIOS main page.

**Note**: Users must wait until the company creation is approved before they can go in and request any user roles for that company.



# **New HIOS Company Creation Confirmation**

#### **Health Insurance Oversight System**

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SIGN OUT

Welcome

#### **New Company Confirmation**

Your request to register the Company below has been submitted for approval. Once approved, you shall receive a notification email.

#### **Company**

Company Legal Name	Registered State	Federal EIN	NAIC Company Code	AM Best Number	Not For Profit	Co- Op	Address Line 1	Address Line 2	City	State	ZIP Code	ZIP Plus 4
Company 3213 21	MD	3213213 21	32111		Yes	Yes	321 Main Str eet		Fairf ax	MD	2212 4	

#### **Company Group**

NAIC Group Code	Group Name

Continue

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# Adding a New Issuer





**Step 1:** Search for company by FEIN.

**Note:** Users are required to have an approved company in HIOS before they are able to create a new issuer.



# Search by FEIN

#### Health Insurance Oversight System

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#### **Organization Registration**

Please enter your company's 9 digit Federal EIN below and select 'Search' to determine if your company currently exists in HIOS.

Federal EIN: 321321321 Search

#### Company

Company Legal Name	Registered State	Federal EIN	NAIC Code	Address Line 1	Address Line 2	City	State	ZIP Code	ZIP Plus 4
Company 321321	MD	321321321	32111	321 Main Street		Fairfax	MD	22124	

#### **Issuers**

There are no Issuers currently registered in HIOS for your company

Back Add Issuer

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Step 2: If the company is approved, the user will be able to add new issuers by clicking on the 'Add Issuer' button and be navigated to the 'Register New Issuer' page.





## **Add New Issuer**

		HOME	FAQ	CONTACT US SIGN OUT
				Welcome
Register New	Issuer			
Please fill in the form be	elow with your Issuer's information.			
Note: (*) Indicates a	required field.			
Issuer Legal Name:	Company 321321			
*Registered State:	•			
Federal EIN:	321321321			
NAIC Company Code:	32111			
NAIC Group Code:				
*Market Coverage:	•			
Domiciliary Address				
*Address Line 1:				
Address Line 2:				
*City:				
*State:	•			
*ZIP code:				
ZIP Plus 4:				
Back				
				and Add Another Issuer





**Step 3:** Users have the ability to add up to ten issuers in a single session. Once they have completed the form, they will submit it for approval.





## **Add New Issuer**

					НО	ME FA	Q (	CONTA	CT US	SI	GN OUT
								We	lcome		
Register New	Issue	er									
lease fill in the form be	elow with y	our Issue	r's info	rmation.							
Note: (*) Indicates a	required fi	eld.									
Issuer Legal Name:	Compan	y 32132	L								
*Registered State:	•										
Federal EIN:	3213213	321									
NAIC Company Code:	32111										
NAIC Group Code: *Market Coverage:		•									
J.											
Domiciliary Address *Address Line 1:											
Address Line 2:											
*City:											
*State:	-										
*ZIP code:											
7IP Plus 4:											
ZIF FIGS 4.											
Back							Save a	nd Add	d Anotl	her Iss	uer
Below are the Issuers t the Delete link on that		ve reque	sted to	create. To	remove a	n Issuer	from	the ta	ble, y	ou ma	y select
		NAIC	NAIC							ZIP	
Issuer Legal Registered Name State	Federal EIN	Company		Market Coverage	Address Line 1	Address Line 2	City	State	ZIP Code	Plus 4	Actions
Company 3213 VT	321321321	32111		Individual	123 Main Street		Fairf ax	VA	2212 4		Delete
			Su	ıbmit							





**Step 4:** The user will see confirmation that the information was submitted and have the ability to navigate back to the HIOS main page.





### **New Issuer Confirmation**

### Health Insurance Oversight System

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**SIGN OUT** 

Welcome

#### **New Issuer Confirmation**

Your request to register the Issuers below has been submitted for approval. Once approved, you shall receive a notification email.

Issuer Legal Name	Registered State	Federal EIN	NAIC Company Code	NAIC Group Code	Market Coverage	Address Line 1	Address Line 2	City	State	ZIP Code	ZIP Plus 4
Company 3213 21	VT	321321321	32111		Individual	123 Main Street		Fairf ax	VA	2212 4	

Continue

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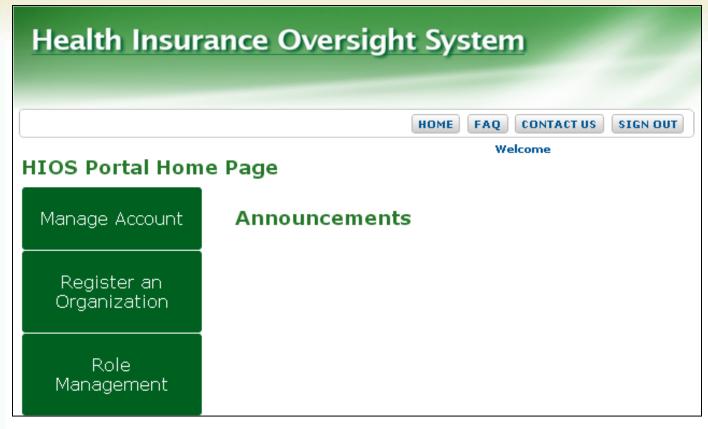


# User Role Request





## **HIOS Main Page - Role Management**







# **New and Existing Roles**

- •Users can view their existing roles under the View Existing Roles Tab.
- •Users can request new roles for different Modules under the Request Role Tab.





# **View Existing Roles**







# **Role Request Process**

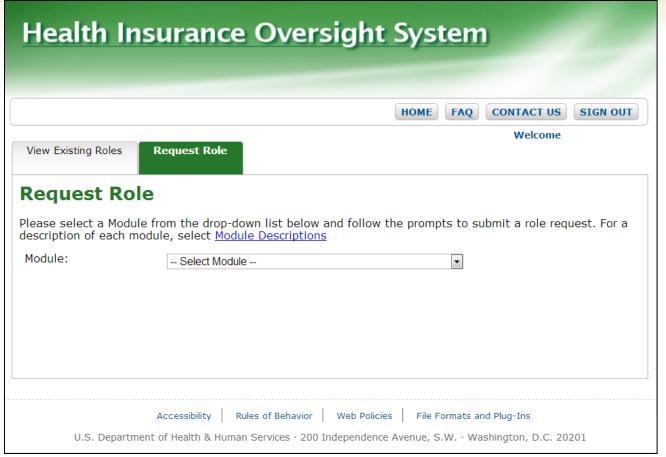
**Step 1:** Select a Module from the drop down list.

Note: For first time users, who are not sure which module to select, a PDF document hyperlink (Module Descriptions) is available, which explains the purpose of each module.





# Request Role-Select Module







# **Role Request Process**

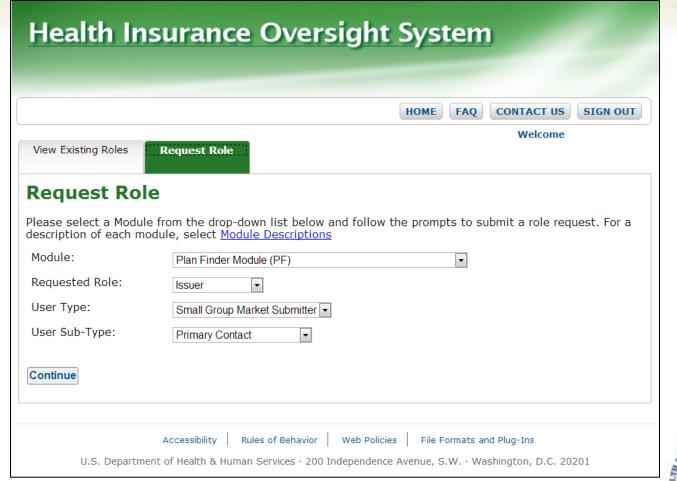
**Step 2:** Select the Requested Role from the drop down.

Note: The User Type and User Sub-type drop downs will only be displayed for Modules with User Roles that require them.





# Request Role- Select Role, Type, Subtype





# **Role Request Process**

**Step 3:** Click Continue and a User Association section will be displayed.

Note: The Association section displayed will be based on the Module selected.

Example:

Plan Finder is an issuer based Module (Input: Issuer ID). MLR is a Company based module (Input: FEIN).





### **Role-Issuer Association**







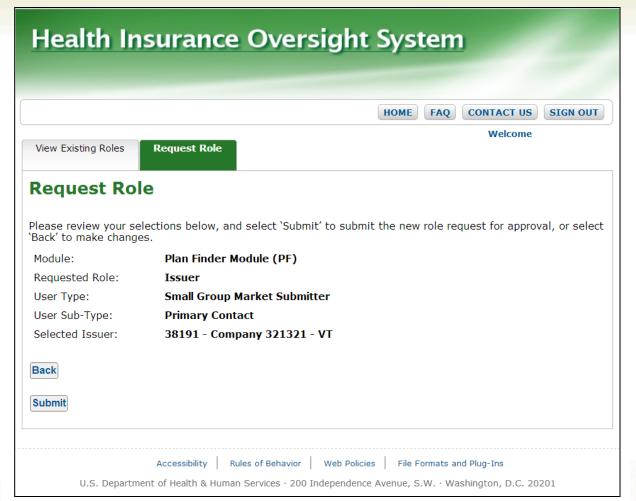
# **Role Request Process**

**Step 4:** Click Review/Continue to be navigated to the Information Review Page.





# Request Role-Information Review







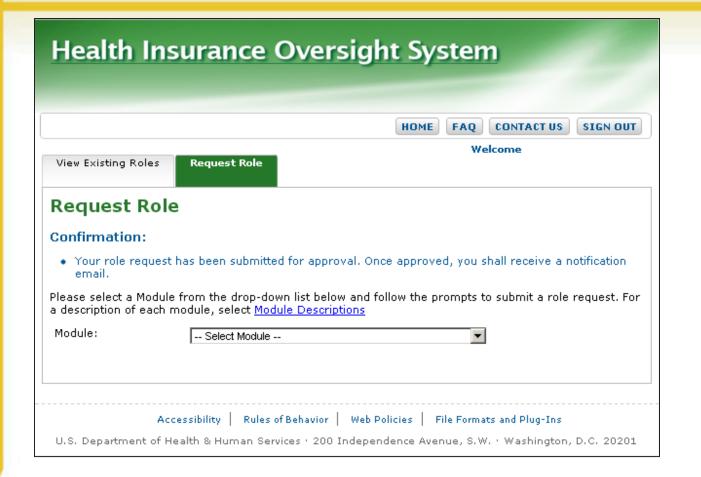
# **Role Request Process**

Step 5: Click Submit and user will be navigated to the Confirmation Page with the text "Your Role Request has been Submitted."





# **Request Role- Confirmation**







# HIOS Plan Finder Product Data Collection Updates

February 25, 2013





# **Agenda**

- Requesting Standard Component IDs
- ☐ Template Q4 Changes





# Standard Component Identification (SCID)





### **Standard Component ID (SCID)**

- •A Component ID is the base identification of an insurance plan prior to it being submitted to a system.
  - Component IDs are equivalent to Plan IDs from RBIS.
  - •Component IDs are required for submitting plans to the exchanges.
- •Component IDs can be requested through the HIOS Plan Finder Product Data Collection Module.
  - •All component IDs must be assigned to a product.
  - •The product must be created in HIOS before users can request a Component ID.
- •Existing Component IDs can be viewed through HIOS Plan Finder.
- •RBIS users can continue to use the Plan IDs generated by the RBIS system.



## **Standard Component ID (SCID) Format**

- •Component IDs will be generated in the appropriate format by the SCIS system upon user request.
- •Component IDs will be 14 characters in length.

#### Example:

Issuer ID ---- 10020 Product ID----10020DC003

Component ID's will be: 10020DC0030001 10020DC0030002





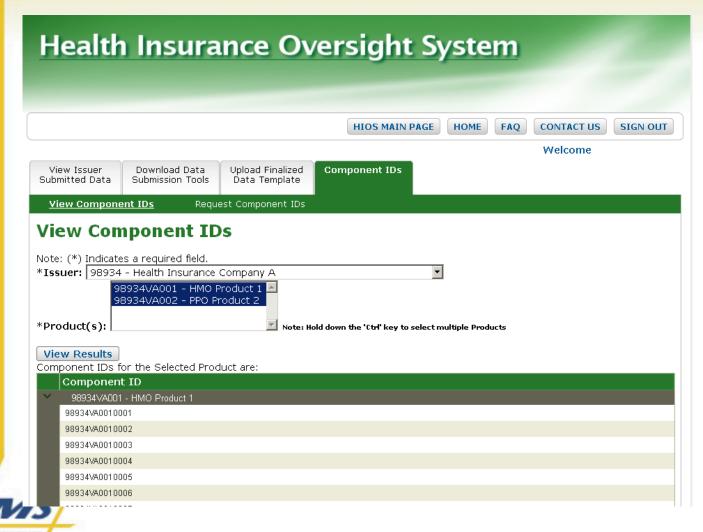
# Login to HIOS, Click on Plan Finder





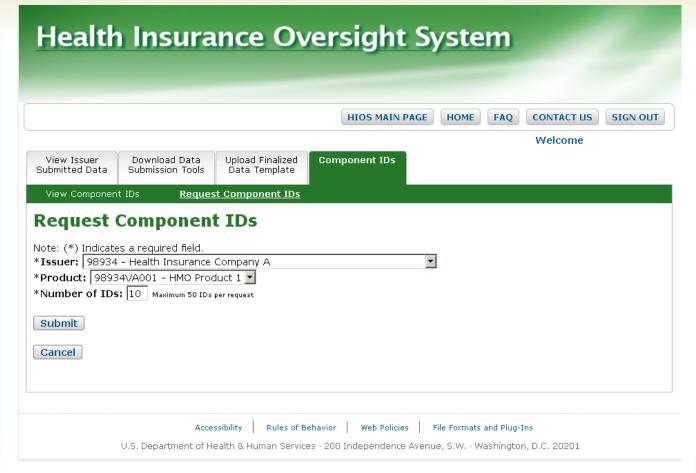


# View Component ID's (in Plan Finder)





# Request Component ID's

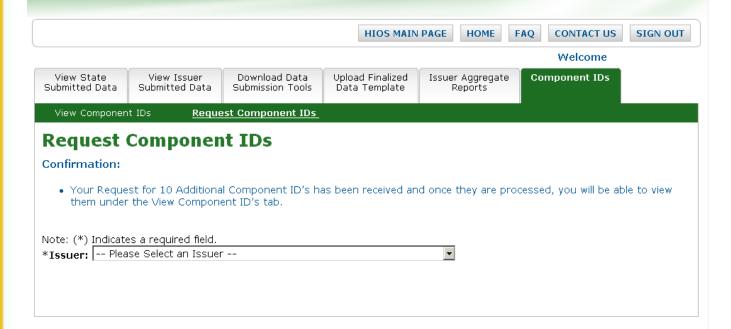






# **Confirmation Page**

#### Health Insurance Oversight System







# **Q4-Issuer Template Changes**

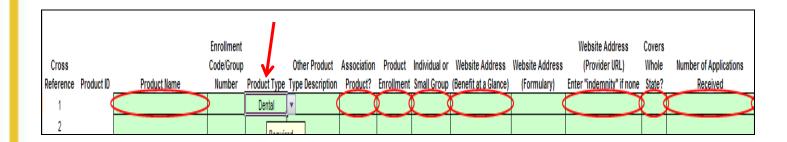




# **Q4 Template Updates**

Q4 Plan Finder template will have the following updates:

<u>Dental Product Type</u> – HIOS will capture the Dental Product Type. A new drop down value for DENTAL will be added as a Product Type option.







# **Q4 Template Updates**

Q4 Plan Finder template will have the following updates:

<u>Approved Product</u>: HIOS will allow for the collection of non-approved products. As part of the collection effort, a new column is added to the issuer template for Approved Product (Yes/No).

Website Address	Covers		Number of	Number of	Number of									
(Provider URL)	Whole	Number of Applications	Applications	Up-Rated	Administrative		Open or		Other Closed	Grandfathered	Effective	Effective	Approved	
Enter "indemnity" if none	State?	Received	Denied	Offers	Disqualifiers	SERFF-Number	Closed?	Closed Reason	Reason	Product?	Start Date	End Date	Product?	
						) (		)	(			)	Yes	
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